

User Training Activity Guide

www.iepwriter.com/pa

Introduction

The IEPWriter User Training Activity Guide was developed by Leader Services' IEPWriter Help Desk to supplement the user training program. This guide contains activities that will teach you how to navigate through IEPWriter and work through an IEP, and also includes time-saving tips.

Learning Objectives

Upon completion of this guide, you should be able to:

- Access IEPWriter and log in successfully;
- Navigate through the website and through document sections;
- Understand and be able to use site navigation tools;
- Add entries to each of the Library banks;
- Utilize time-saving features, including asterisks and pronouns;
- Utilize bank information in documents;
- Locate student records and understand the student demographic/parents area;
- Identify and understand case manager and contributor access to student records;
- Complete a school-age IEP;
- Generate a draft document;
- Finalize and revise a document.

How to Use This Guide

This guide is divided into sections; each section contains a brief explanation of a topic, followed by a set of activities designed to give you hands-on experience with IEPWriter.

Your instructor will begin the training by getting you familiar with a section of IEPWriter and will then give you the opportunity to work on an activity in that section. You are allotted a specific amount of time to complete an activity. At the end of each activity is the following message:



**You have completed all the activities in this section.
Please minimize your browser (do not log out) and
return your attention to the trainer.**

If you have completed the activity, follow the directions and minimize your browser by clicking the minimize button.



If you did not complete the activity in the amount of time given, turn your attention to the trainer. You can complete the activity at any time after the training and you can use this activity guide for reference.

Your Thoughts Matter

You will find an IEPWriter Training Feedback form at the end of this guide. Please take the time to complete the form and return it to your instructor. Leader continually strives to improve our users' experience with our software and your input is greatly appreciated.

System Requirements

IEPWriter.com supports most common web browsers that are properly configured.

Windows Systems	Macintosh Systems
The minimum requirements for Windows systems: <ul style="list-style-type: none">• Windows 2000, XP, or higher• Internet connection at 56kps or higher (broadband recommended)	The minimum requirements for Macintosh systems: <ul style="list-style-type: none">• Mac OS 10.3 or higher• Internet connection at 56kps or higher (broadband recommended)
One of the following preferred browsers: <ul style="list-style-type: none">• Internet Explorer 6 and 7• Firefox 2 and 3	One of the following preferred browsers: <ul style="list-style-type: none">• Firefox 2 and 3• Safari 1.3, 2.0, and 3.0
With: <ul style="list-style-type: none">• Pop-ups and cookies enabled for www.iepwriter.com	With: <ul style="list-style-type: none">• Pop-ups and cookies enabled for www.iepwriter.com

And the following free browser plug-ins:

- Adobe Reader 9.x or higher (the latest version is recommended):
<http://www.adobe.com/products/acrobat/readstep2.html>
- Adobe Flash Player plug-in 9.x or higher (the latest version is recommended):
get.adobe.com/flashplayer

Note: IEPWriter should perform adequately on Linux and UNIX in supported web browsers (Firefox). Please check with Leader Services if you have any questions about running the applications on other platforms or browsers.

For instructions on enabling pop-ups, visit:

<https://www.iepwriter.com/pa/systemrequirements.asp>

To access the website, open your browser and go to:

<http://www.iepwriter.com/pa>

Logging Into IEPWriter



Log into IEPWriter at this time using the login information provided by your trainer, located at the top right-hand corner of this guide's cover.

Forget your password?

If you entered your email address in IEPWriter in the *My Account* section, click the *Forgot your username/password?* link, enter your email address, and click *Submit*. IEPWriter will email your username and password.

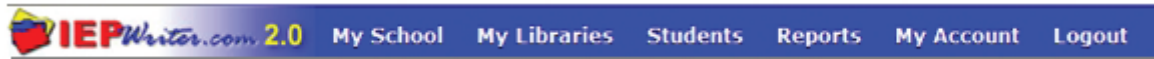
Getting More Help

For answers to common problems, click the *Help* button, located in the top right-hand corner of the main navigation bar of IEPWriter; a new *Help* window will open.

Navigating in IEPWriter

Toolbars

Top Navigation Bar – Use this main IEPWriter navigation bar to access the various sections of the program.



Border Navigation Bar – This bar lists the name, title, and school district of the currently logged-in user. Click *Home* on this bar at any time to return to the main navigation screen.

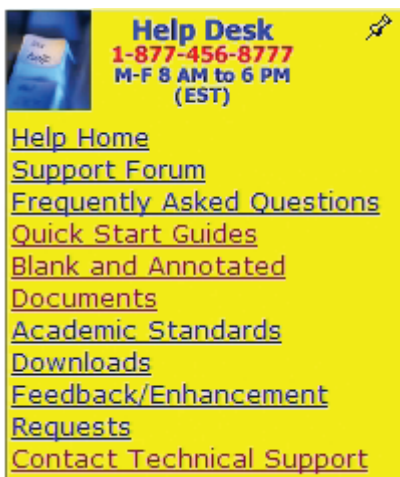


Side Navigation Bar (fly-out menu) – The links in this menu change depending on which section of IEPWriter section you're in. For example, if you are on the Home screen, a Current News item displays, or if you are on the IEP Home screen, links to the various IEP sections display.

Navigation

The left navigation menu displays links for:

- **Support Forum** – Moderated self-help forum where you can post and view questions.
- **Blank and Annotated Documents** – Copies of the state forms, from PaTTAN.
- **Quick Start Guides** – Instructional guides for IEPwriter and Children Count.
- **Downloads** – Links to obtain Firefox and Adobe Reader.
- **Academic Standards** – In PDF and Word format for your use.
- **Chapter 14 and 16 PA Codes**



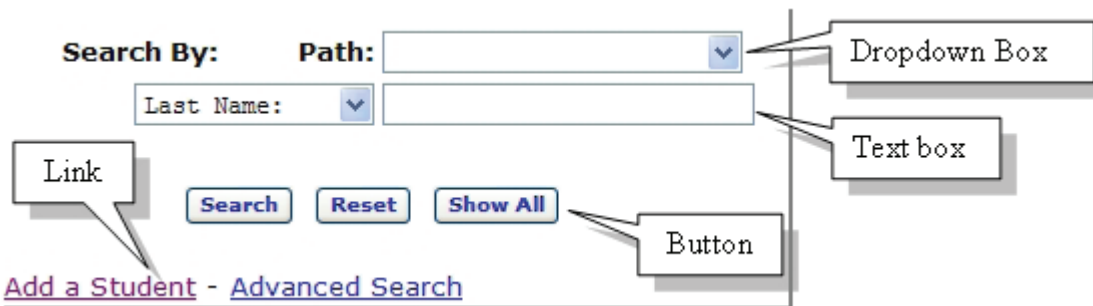
If you encounter a problem that cannot be answered by clicking one of these links, contact Leader's helpdesk, toll-free at (877) 456-8777.

This toll-free number is located in the footer of every screen of IEPWriter, along with a link to send an email support request.

Ways to Enter Data

There are various ways to enter and select data in IEPWriter.

- **Link** – Click to jump to another section of IEPWriter.
- **Drop-down menu** – Click the down arrow to choose from the available options in the list.
- **Text box** – Type data into this empty box.
- **Button** – Clicking the button will perform an action, such as add, update, reset, delete.



Library Buttons

- **Magnifying glass** – Search the bank (G-Goals, O-Objectives, T-Text)
- **File folder with green arrow** – Save to Text Bank
- **Red Magnifying Glass** – Change History (displays all information saved in the current text box).



Bottom Frame Buttons

The following buttons display on the bottom frame of some IEPWriter screens.

- **Save and Stay** – Save my work and stay on the same screen.
- **Save and Go to...** – Save my work and go to the next area.
- **Go to...** – I didn't do anything on this screen; I just want to proceed.
- **Reset** – Clears edited text and returns the screen to the last saved state.
- **Generate Draft** – Generates a PDF copy of the document.
- **Finalize** – Generates an electronic hard copy and locks the document.



Note: The above tools and buttons are found throughout IEPWriter, whether you are working on an ER, an IEP, a GIEP or a PBSP.

My Libraries

Although you are required to write individualized documents for each student, many of the phrases and paragraphs you will use are similar. Saving this information in IEPWriter's libraries and reusing it can save you a great deal of time.

Wildcards

You can use wildcard characters to personalize entries for each student, such as:

- an asterisk (*) for the student's name
- pronoun combinations, (He/She) for the student's gender

Goals and Objectives Library

The Goals and Objectives library is used only in the Goals section of the IEP and PBSP. You must save information directly into this library in order to use it in a document. The goal and objective subjects are designed similarly to curriculum subjects (math, English, physical therapy, etc.).

When creating an entry for a goal or objective, it is prudent to include a goal sub-category and possibly a goal level; these will enhance your search capabilities.

Example: An elementary math teacher enters 100 goals in IEPWriter under the category of math. If the teacher then wants to find all goals who use addition, she must search through 100 goals to find the one she wants.

If instead she enters 40 of those 100 goals with a subcategory of *addition*, she only needs to search through 40 goals. Better still, if she enters five of those 40 goals with a goal level of *third grade*, she only needs to search through five goals to find the one she wants – a real time saver.

Text Bank

Unlike the Goal Bank, which is used only in the goals area, the Text Bank is used everywhere else in IEPWriter that displays a text box. A big advantage to the Text Bank is that you can save information to the bank while you write your documents. Just like in the Goal Bank, you can utilize wildcards to personalize your documents.

The key to saving information in the text bank is choosing where to place it, which is based on the answer to this question – Where am I in IEPWriter?

Example: You're working in the *Academic Achievement* section of the student's IEP, and want to save information in the text bank for future use. In this case, you would place the text in the *Current Academic Achievement* subject of the *Text Bank*.

Signature Bank

The Signature Bank allows you to keep a list of regularly used names for inclusion in the signature section of your documents, such as the *Invitation to Participate* and *IEP*. You can manually enter names in your bank, or choose from a list of IEPWriter users. Once your bank is established, you can choose all, or a selection of, the names for inclusion in each document.

Activity 1: My Libraries – Goal Bank

Activity 1A - Add a Goal

1. Click the [My Libraries](#) link on the top navigation bar.
2. Click [My Goals/Objectives/Outcomes Library](#) on the My Libraries main screen.



3. Locate the *Math* subject area from the *Goal/Subject* list and click the [Add](#) link located on the same row under the *Goals* column.

Goal Subject	Goals
Attn to Skills	Entries - 0 Add
Attn to Tasks	Entries - 0 Add
Autism	Entries - 0 Add
Behavior	Entries - 0 Add
bip	Entries - 0 Add
Daily Living Skills	Entries - 0 Add
Gifted	Entries - 0 Add
Independent Living/Adaptive Behavior	Entries - 0 Add
Literature	Entries - 0 Add
Math	Entries - 0 Add
Math123	Entries - 0 Add

4. From the *Sub-category* drop-down menu, select *Addition*, then select *Primary* from the *Goal Level* drop-down menu.
5. Type: *"* will add double-digit numbers. He/She can do this with xx% accuracy."*

Reminder: Using the * (asterisk key) and the male/female pronoun combination allows you to import goals into any document with the correct student pronoun substituted for you.

6. Verify the information, and click the **Add Goal** button.

My Goals

Add Goal for Math

Sub-category: Addition

Goal Level: Primary

Goal: * will add single digit numbers. He/She will do this with 100% accuracy.

Reset Add Goal Cancel & Return

Your session will expire in 56 minutes and 27 seconds

7. Click the [Return to My Goals/Objectives Library](#) link, located near the top of the screen.

My Goals

Goal Added for Math

- [Add another Goal for Math](#)
- [Go to Goal Menu for Math](#)
- [Return to My Goals/Objectives Library](#)

Sub-category: Addition

Goal Level: Primary



You have completed this activity. Please complete the next activity.

Activity 1B - Edit a Goal

1. Select the *Math* subject area under *Goals/Subject*.
2. Click the [Search](#) link, located on the same line.

Goal Subject	Goals
Attn to Skills	Entries - 0 Add
Attn to Tasks	Entries - 0 Add
Autism	Entries - 0 Add
Behavior	Entries - 0 Add
bip	Entries - 0 Add
Daily Living Skills	Entries - 0 Add
Gifted	Entries - 0 Add
Independent Living/Adaptive Behavior	Entries - 0 Add
Literature	Entries - 0 Add
Math	Entries - 1 Search Add
Math123	Entries - 0 Add

Goals (click to edit or view full text)	Sub-category	Goal Level	
* will add double digit numbers. He/She can do this with x% accuracy	Addition	Primary	Delete this Goal

Goals 1 to 1 of 1

Click to delete a goal from ban.

3. Click the words ** will add...*
4. Change the word *double* to the word *single*.

Reminder: You can use standard editing procedures in IEPWriter. For example, you can select the word you want to change and then type in the new word.

5. Click the **Save Goal** button.
6. Click the [Return to My Goals/Objectives Library](#) link.



You have completed this activity. Please complete the next activity.

Activity 1C - Add Objectives

1. Locate the *Math* subject area and click the [Add](#) link on the far right-hand side of the screen under *Objectives*.

Goal Subject	Goals	Objectives/Outcomes
Attn to Skills	Entries - 0 Add	Entries - 0 Add
Attn to Tasks	Entries - 0 Add	Entries - 0 Add
Autism	Entries - 0 Add	Entries - 0 Add
Behavior	Entries - 0 Add	Entries - 0 Add
bip	Entries - 0 Add	Entries - 0 Add
Daily Living Skills	Entries - 0 Add	Entries - 0 Add
Gifted	Entries - 0 Add	Entries - 0 Add
Independent Living/Adaptive Behavior	Entries - 0 Add	Entries - 0 Add
Literature	Entries - 0 Add	Entries - 0 Add
Math	Entries - 1 Search Add	Entries - 0 Add
Math123	Entries - 0 Add	Entries - 0 Add

2. Select *Addition* for the Sub-Category.
3. Type: " * will complete 50 Math problems".
4. Click [Add Objective](#).
5. Click *Return to My Goals/Objectives Library*.

Reminder: You will see the search link for the objective. This functions in the same way that the search link for the goal functions.



You have completed this activity. Please complete the next activity.

Activity 2: My Libraries – Text Bank

Activity 2A - Add a Text Entry

1. Click the [My Libraries](#) link located on the IEPWriter navigation bar.
2. Click the [My Text Bank](#) icon located on the [My Libraries](#) main page.
3. Click the [Educational Levels of Performance](#) link.

Subject Area (click to review all text records or add a new one)	Current number of records
Accommodations	0
Columns	0
Conclusions	0
Coordination of Transitional Services	0
Course of Study	0
Current Educational Program	0
District Assessment Inappropriate	0
Educational Levels of Performance	1
Educational Placement	0
Effect on General Education Curriculum	0

4. Click the [Add a text record for Educational Levels of Performance](#) link.

My Text Bank

Subject Area - Educational Levels of Performance

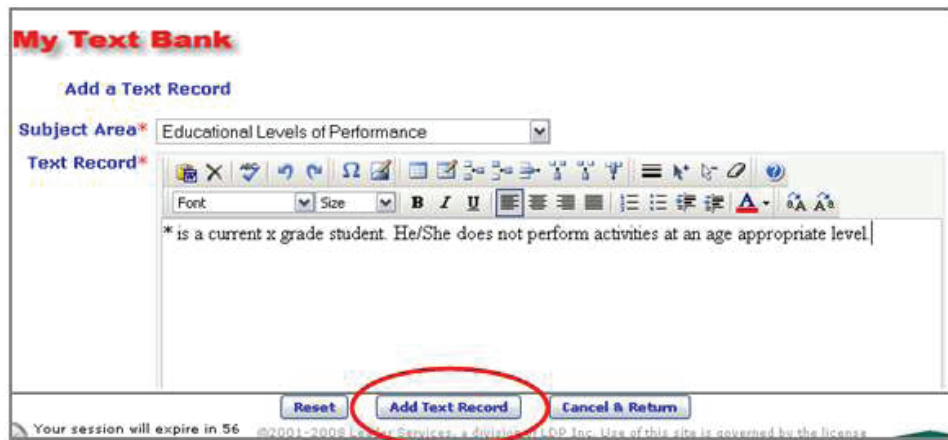
[Add a text record for Educational Levels of Performance](#)

Enter word(s) to search by:

5. Type: " * is a current x grade student. He/She does not perform activities at an age appropriate level."

Reminder: Use an asterisk (*) and the male/female pronoun combination to import a text record into any document with the correct student name and pronoun automatically entered.

6. Click the **Add Text Record** button.



My Text Bank

Add a Text Record

Subject Area* Educational Levels of Performance


Text Record*

* is a current x grade student. He/She does not perform activities at an age appropriate level

Reset Add Text Record Cancel & Return

Your session will expire in 56 ©2001-2008 Loder Services, a division of LOP Inc. Use of this site is governed by the license

7. Click the [Return to Text Bank Menu](#) link.



My Text Bank

Text Record Added

You have added the below Text Record. [Add another Text Record for Educational Levels of Performance](#)

Subject Area: Educational Levels of Performance

Text Record: * is a current x grade student. He/She does not perform activities at an age appropriate level.

[Return to List of Text Records for Educational Levels of Performance](#)

[Return to Text Bank Menu](#)




You have completed this activity. Please complete the next activity.

Activity 2B - Editing a Text Entry

1. Click the [Educational Levels of Performance](#) link.
2. Click the [Edit](#) link, located on the same line as your text entry.

Text Records	
Maintain Records	
* is a current x grade student. He/She does not perform activities at an age appropriate level.	Edit Delete
Records 1 to 1 of 1	



3. Edit the text to read: ** is a current x grade student. He/She performs activities at an age appropriate level.*
4. Click the **Save Text Record** button.
5. Click the [Return to Text Bank Menu](#) link.

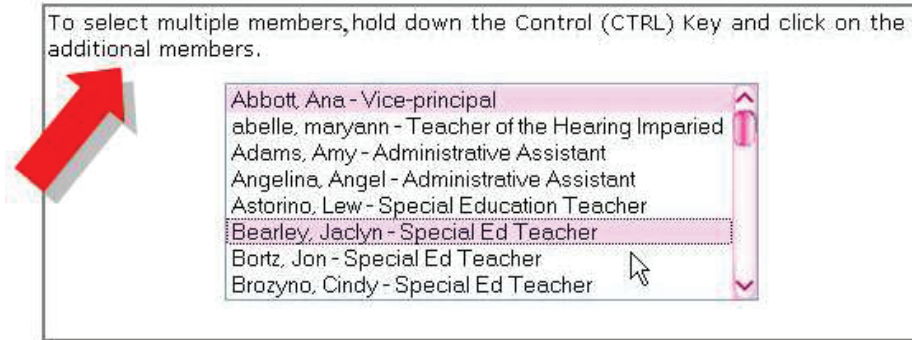


You have completed this activity. Please complete the next activity.

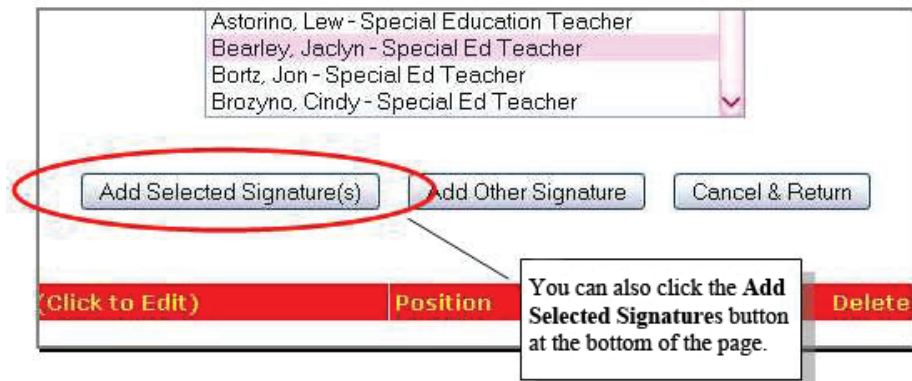
Activity 3: Adding/Editing Signatures in the Signature Bank

Activity 3A - Adding a Selected Signature

1. Click the [My Libraries](#) link on the top navigation bar
2. Click the [My Signature Bank](#) link on the My Libraries main screen.
3. Select the name *Abbott, Ana*, then press and hold the Control key [Ctrl] on your keyboard [Alt key on the Mac] and click on the keyboard [Alt key on the Mac] and select *Bearley, Jaclyn*.



4. Click the **Add Selected Signature(s)** button.



You have completed this activity. Please complete the next activity.

Activity 3B - Adding Another Signature

1. Click the **Add Other Signature** button.
2. Type: "Marie Sanchez" in the Name field.
3. Select *Speech Therapist* from the *Position* drop-down menu.
4. Click the **Add Attendee** button.



My Signature Bank

Add 'Other' Signature:

Name * Marie Sanchez

Position * Speech Therapist

* Required

Reset Add Attendee Cancel & Return

Your session will expire in 56 seconds.



You have completed this activity. Please complete the next activity.

Activity 3C - Editing a Signature

1. Click the [Sanchez Marie](#) link.

Name(Click to Edit)	Position	
Sanchez, Marie	Speech Therapist	<div>Click to remove a signature from bank</div> <div>Delete</div>

2. Edit the Name field by changing the “e” in Marie to an “a”. The name should now read: *Maria Sanchez*.
3. Click the **Save Signature** button.



You have completed all the activities in this section. Please minimize your browser (do not log out) and return your attention to the trainer.

Student Home/Start New Student Record

To access students' records:

1. Click *Students* in the main navigation bar; the *Student List* displays.
2. Click the [Student Name](#) link; the *Student Home* screen displays.

Student List

The *Student List* displays all students on your roster. Your IEPWriter administrator has the ability to add or remove students from your roster.

At the top of the list are a number of ways to narrow your search for students. The most commonly used is the *Last Name* text box. To use this option, enter one or more characters of the student's last name and click the **Search** button.

On the *Student List* screen, a dark bar tops the list of students, containing descriptions for each column. To access a student's records, click on the name of the desired student.

Student Home Screen - New Documents, Work in Progress, and Finalized Documents

All forms are located on the *Student Home* screen. Click the *Start New* link to start a new document. Once you've started a document, the *Start New Link* changes to a *Work in Progress* link. The currently implemented IEP can be edited for progress reporting or revision.

Finalized documents display as PDF documents under the *View Previous* heading on the *Student Home* screen.

IEP Home Screen

Dates can be added by typing or using the calendar buttons. The **Calendar** button for the Duration Date is set one year from Implementation Date. Red text indicates that it cannot be edited in the current location. The demographic information must be edited in the *Demographic* section of the student record.

Adding Signatures

You can add signatures in one of two ways:

- Individually using the *Signature Bank*;
- Import a signature into the IEP if you have a finalized *Invitation to Participate*.

You can reorder the list of signatures by using the reorder arrows.

Special Considerations

Respond to the radio buttons for each question. If you do not respond to a question, the answer will default to *No* and display that way on the draft.

If you choose *Yes* to the question *Is the student is deaf or hard of hearing?*, the Communications Plan will automatically append to the end of the IEP.

Activity 4: Start IEP, IEP Home, Signatures & Special Considerations

Activity 4A - Start a New IEP

1. Click the [Students](#) link on the top navigation menu; the *Student List* screen displays.
2. Locate a school-age student and click on that student's name to navigate to the *Student Home* screen.



Student Home	Gifted Student Home	EI Student Home	504 Student Home
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This is the student home page for **Angel, Abigale**.

Please select an activity

IEPs

[Start New IEP](#)

Evaluation/Reevaluation Reports

[Start New ER/RR](#)

3. Click the [Start New IEP](#) link.

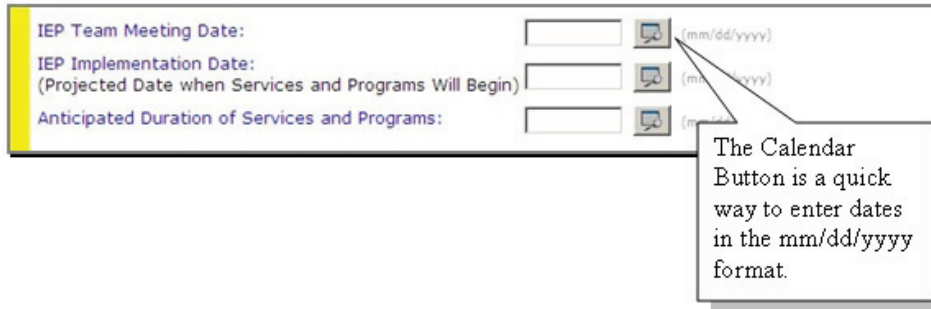
Reminder: Case Managers can start, finalize and edit the complete IEP. Contributors cannot start or finalize IEPs; they can only edit the Present Levels, Goals & Objectives, Transitions & Related Services sections of the IEP.



You have completed this activity. Please complete the next activity.

Activity 4B - Adding Dates to a New IEP

1. Type: "08/12/2009" in the *Meeting Date* field.
2. Use the **Calendar** button and select 8/14/2009 for the *IEP Implementation Date* field.
3. Select a *Duration Date* of 8/11/2010 using the **Calendar** button.



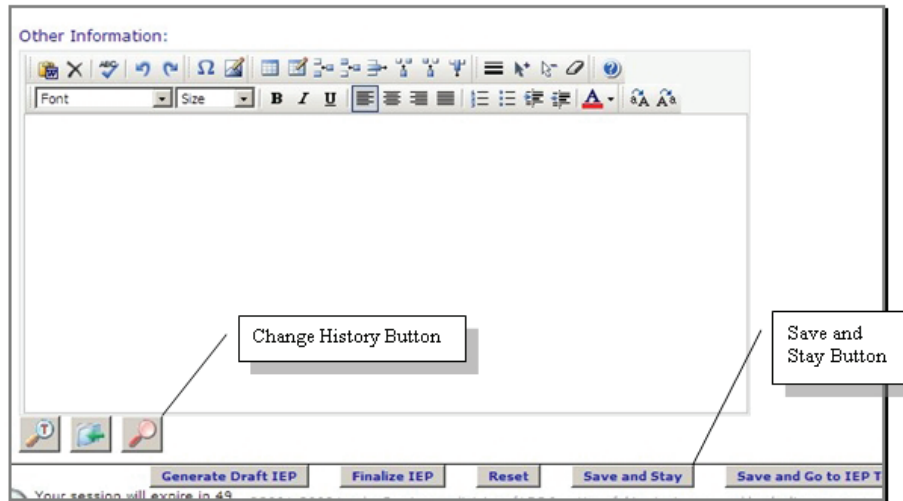
The screenshot shows a form with three rows of date fields. Each row has a text input field followed by a small calendar icon button. The first row is labeled "IEP Team Meeting Date:" and has a placeholder "(mm/dd/yyyy)". The second row is labeled "IEP Implementation Date: (Projected Date when Services and Programs Will Begin)" and has a placeholder "(mm/dd/yyyy)". The third row is labeled "Anticipated Duration of Services and Programs:" and has a placeholder "(mm/dd/yyyy)". A callout box points to the calendar buttons with the text: "The Calendar Button is a quick way to enter dates in the mm/dd/yyyy format."



You have completed this activity. Please complete the next activity.

Activity 4C - Using the Change History button

1. Type: "Test text" in the *Other Information* text box.
2. Click the **Save and Stay** button at the bottom of the screen.
3. After the screen refreshes, edit the text in the *Other Information* text box to read: *Sample text*.
4. Click the **Save and Stay** button.
5. Click the **Change History** button to view the changes made to this record.



6. Close the *Change History* window/tab (be careful not to close out of IEPWriter).
7. Click the **Save and Go to IEP Team** button.



You have completed this activity. Please complete the next activity.

Activity 4D - Add a Signature from the Signature Bank

1. To add multiple signatures, click the [Add Signatures from Signature Bank](#) link.



IEP TEAM/SIGNATURES	
Role	Name
Physician	Lewann Alexander
Regular Education Teacher	Jane Apple
Speech Therapist	Beth Amos
Mother	bonnie adler

2. Ensure that *Ana Abbott* and *Maria Sanchez* are selected. Deselect *Jaclyn Bearley* using the checkboxes.
3. Click the **Import selected signatures into IEP** button.
4. After the signature screen refreshes, use the blue arrows under the *Reorder* heading to move the names of the parents and student (if applicable) to the top of your signature list.



5. Click the **Save and Go to Special Considerations** button.



You have completed this activity. Please complete the next activity.

Activity 4E - Special Considerations

Select Options Using Radio Buttons

Radio buttons will allow you to toggle between options.

Is the student blind or visually impaired?

☒ Yes The IEP must include a description of the i
evaluation of the student's reading and wr
the student's future needs for instruction i
appropriate for the student.

☐ No

Is the student deaf or hard of hearing?

☒ Yes The IEP must include a communication plan
communications with peers and profession

1. Select Yes for each of the following questions:
 - a. Is the student blind or visually impaired?
 - b. Is the student deaf or hard of hearing?
 - c. Does the student have limited English proficiency?
2. Select No for each of the following questions:
 - a. Does the student have communication needs?
 - b. Does the student need assistive technology devices and/or services?
 - c. Does the student exhibit behaviors that impede his/her learning or that of others?
3. Change the selection for *Is the student deaf or hard of hearing?* to No.

Reminder: If you select Yes for the question *Is the student deaf of hard of hearing?*, a Communication Plan will be included as part IEP.

4. Click the *Save and Go to Present Levels* button.



You have completed all the activities in this section. Please minimize your browser (do not log out) and return your attention to the trainer.

Present Levels

To access Present Levels, click the *Present Levels* link on the *Side Navigation Bar* (fly-out menu) within a student's IEP.

Case Managers and Contributors can add, edit, and delete Present Levels. The user's name, date created and last modified date will be visible under the Present Level.

Note: There are three screens for each present level. This allows IEPWriter to run faster, as less data is saved per screen.

Combining Data into One Present Level

More than one user may need to enter data in *Present Levels*. If you want to combine all data into one Present Level record (academic achievement, functional performance, etc.) remember to **CLICK THE PENCIL ICON** on the far-right side of the existing record.

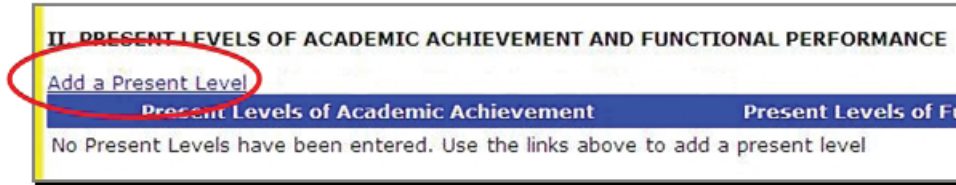
Editing a Present Level

To edit a Present Level, do NOT click the *Add a Present Level* link. This will create a new Present Level record which includes all sections.

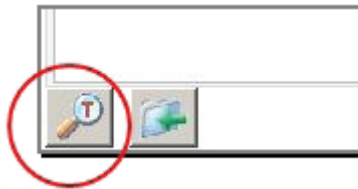
Activity 5: Present Levels

Activity 5A - Add a Present Level from the Text Bank

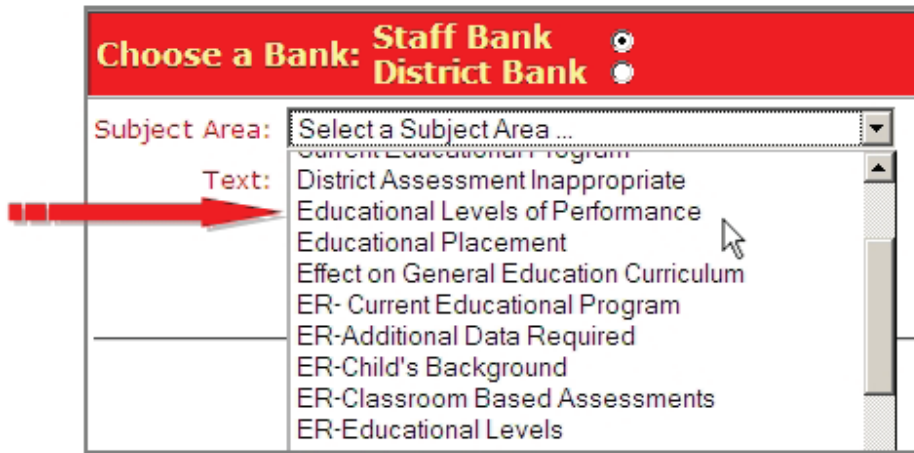
1. Click the [Add a Present Level](#) link.



2. Click the **Search Text Bank** button under the *Present levels of academic achievement* text box to open the search dialog.

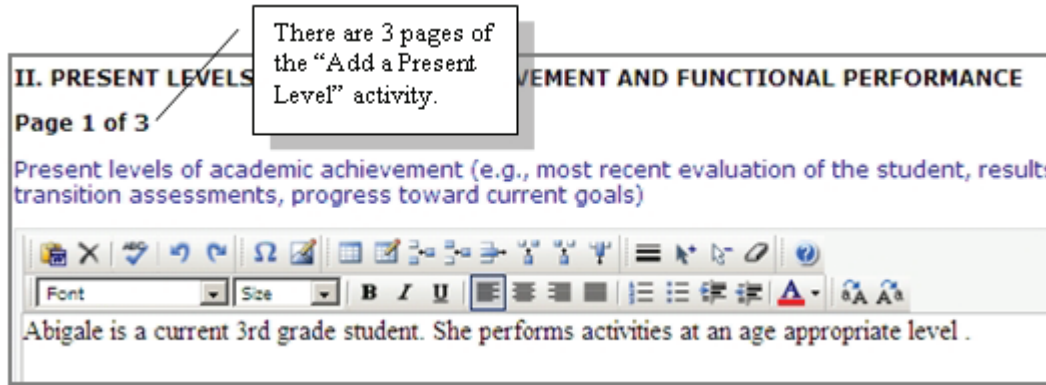


3. Ensure that the **Staff Bank** radio button is selected, and select *Educational Levels of Performance from the Subject Area* drop-down menu.




4. Click the **Search** button.
5. Locate the phrase that applies to your student. In this case, click the *View/Copy* link next to the entry that states *"* is a current Xth grade student. He/She performs activities at an age-appropriate level."* (where *"*"* is the name of the student you are working on).

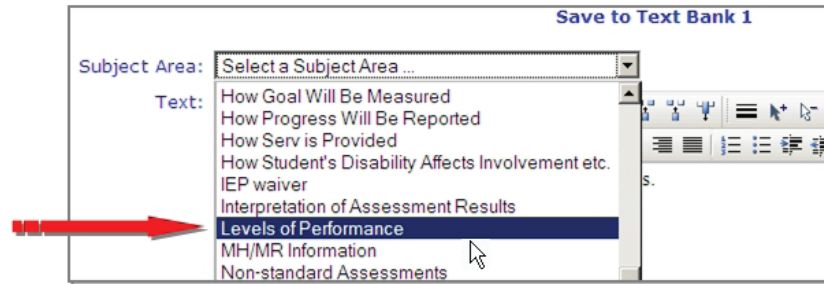
6. The phrase you selected will display in a preview window (You may edit the text in this view if necessary). Click the **Copy Text** button to insert the text into the document.
7. Enter the text: 3rd in place of X in the statement ...X grade student



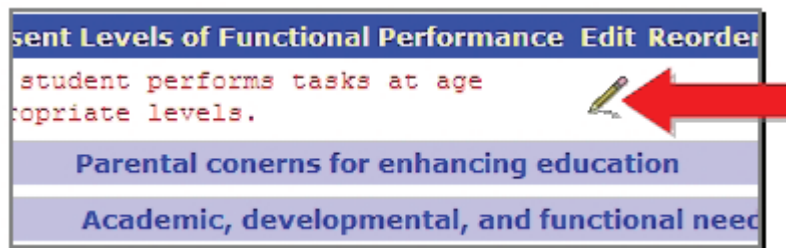
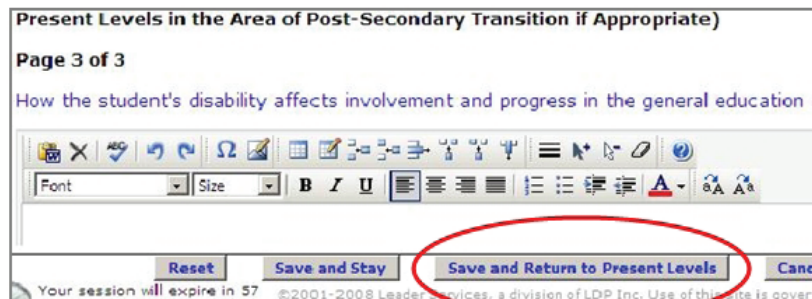
You have completed this activity. Please complete the next activity.

Activity 5B - Saving a Present Level to the Text Bank

1. Scroll down to the *Present levels of functional performance* heading and click in the text box.
2. Type: *"The student performs tasks at age appropriate levels."*
3. Click the button that resembles a folder with a green arrow on it.  This is located below the *Present levels of functional performance* text box. The text that you have typed in your text box will display in a preview window.
4. Change the text: *The student* to an asterisk (*).
5. Select the *Levels of Performance* subject area and click the **Save** button.



6. Click the **Save and go to page 2** button to advance to the next page.
7. Click the **Save and go to page 3** button.
8. Click the **Save and Return to Present Levels** button to return to the *Present Levels* screen.



Reminder: To edit your present level, click the *Pencil* icon.

9. Click the **Go to Transition Services** button.



You have completed all the activities in this section. Please minimize your browser (do not log out) and return your attention to the trainer.

Transition Services and State/Local Assessments

Transition Services

You can access the *Transition Services* section of a student's IEP via the IEP or the *Side Navigation Bar* (fly-out menu).

CIP Codes: The code of the program the student is attending at a Career Center. They can be obtained on the PDE Website using Keyword CIP Codes

If the student is not of age, click the **None at this time** button to indicate that the area was reviewed.

You will be able to add the Activities/Services for each goal after it has been entered.

State/Local Assessments

State assessments and Local assessments are contained on separate screens within the student's IEP.

There is no default choice; you must click one of the radio buttons to designate if/how the student will take the state or local assessments.

Activity 6: Transition Services & State/Local Assessments

Activity 6A - Add a Transition Goal

1. Click the [Add an Employment Goal](#) link.

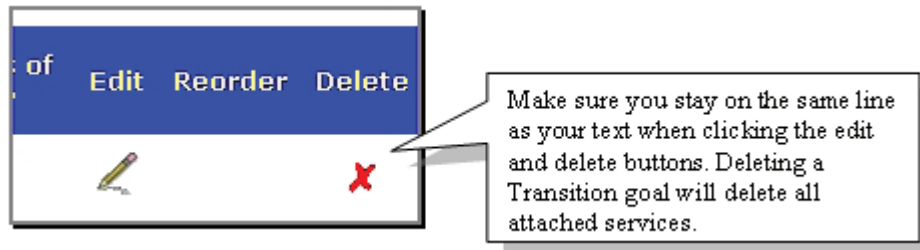


The screenshot shows a web interface with a blue header bar containing the text "Add an Employment Goal" circled in red. Below the header is a table with three columns: "Employment Goal", "Measurable Annual Goal", and "Courses of Study". The table body contains the text "No Employment Goals have been entered. Use the link above." and a checkbox labeled "None at this time".

Reminder: To indicate *Not Applicable (N/A)*, select the *None at this time* checkbox.

2. Type: "[Your student's name] will identify three references for a job and ask them for letters of reference or to be references on an application." in the *Employment Goal* text box.
3. Select the *No* radio button (if it is not already selected) and leave the *Courses of Study* text box blank.
4. Click the **Save and Return** button.

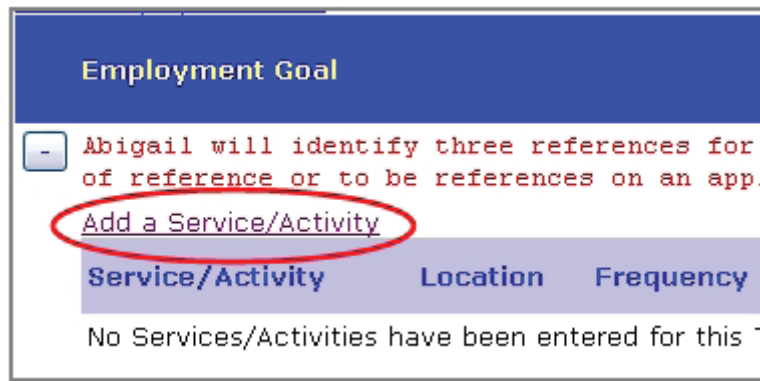
Reminder: To edit or delete your transition service, click the Pencil icon or the "Red X" as seen in the following illustration:



You have completed this activity. Please complete the next activity.

Activity 6B - Adding a Service/Activity

1. Click the [Add a Service/Activity](#) link.



The screenshot shows a web form titled "Employment Goal". Below the title, there is a text area containing the text "Abigail will identify three references for of reference or to be references on an appl". Below this text area, there is a link "Add a Service/Activity" which is circled in red. Below the link, there is a table with three columns: "Service/Activity", "Location", and "Frequency". Below the table, there is a message "No Services/Activities have been entered for this T".

2. Type: "Make a list of possible references" in the Service/Activity text box.
3. Select *Regular/Special Ed Classrooms* for the location.
4. Type: "One time this year" in the Frequency text box.
5. Use the calendar to enter dates in the Begin Date field and the End Date field.
 - For the *Begin Date* field, select today's date.
 - For the *End Date* field, select one year ahead minus one day from today.
6. Click the **Save and Return** button.
7. Click the **Save and Go to Participation in State Assessments** button.



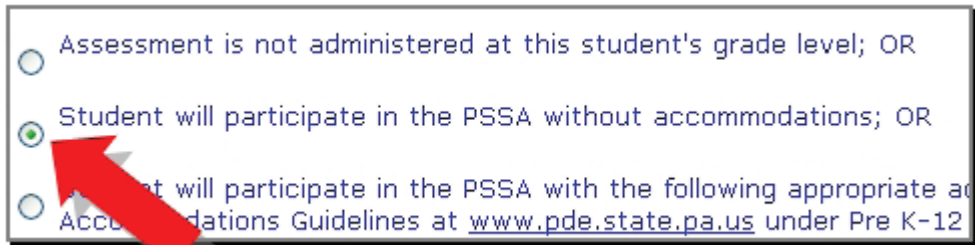
The screenshot shows the bottom of the web form. It contains a message "s have been entered. Use the link above to add a Independe". Below this message, there are two buttons: "Save and Go to Participation in State Assessments" and "Go to". The "Save and Go to Participation in State Assessments" button is circled in red. At the bottom of the form, there is a copyright notice: "©2001-2008 Leader Services, a division of LDP, Inc. Use of this site is govern". Below the copyright notice, there is a link: "For site assistance, contact the Help Desk by clicking here" or call (877) 456-8".



You have completed this activity. Please complete the next activity.

Activity 6C - Complete the State Assessments Page

1. Select the *Student will participate in the PSSA without accommodations* radio button.



☐ Assessment is not administered at this student's grade level; OR

☒ Student will participate in the PSSA without accommodations; OR

☐ Student will participate in the PSSA with the following appropriate accommodations: OR

Accommodations Guidelines at www.pde.state.pa.us under Pre K-12

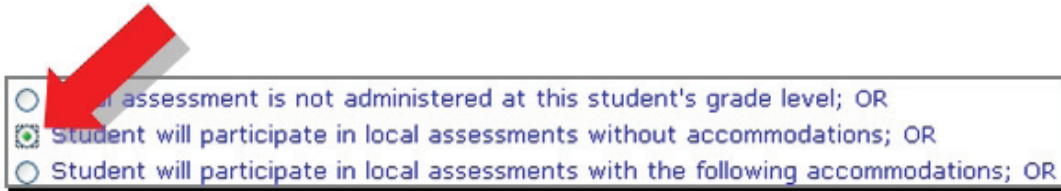
2. Click the **Save and Go to Participation in Local Assessments** button.



You have completed this activity. Please complete the next activity.

Activity 6D - Complete the Local Assessments Page

1. Select the *Student will participate in local assessments without accommodations* radio button.



☐ Assessment is not administered at this student's grade level; OR
☒ Student will participate in local assessments without accommodations; OR
☐ Student will participate in local assessments with the following accommodations; OR

2. Click the **Save and Stay** button.




You have completed all the activities in this section. Please minimize your browser (do not log out) and return your attention to the trainer.

Goals and Objectives

Access the Goals/Objectives Section

Use the *Side Navigation Bar* (fly-out menu) to access the *Goals & Objectives* section of a student's IEP.

V. GOALS AND OBJECTIVES including academic and functional goals:

Measurable Annual Goal <input type="button" value="Add"/>	Describe HOW the student's progress toward meeting this goal will be measured	Describe WHEN periodic reports on progress will be provided to parents	Number Of Objs PRs	Edit Rec
- Abigail will add single digit numbers. She will do this with 80% accuracy	Goals will be measured utilizing a combination of tests, quizzes and observation by staff .	Quarterly	0 0	
Created By: Jim Adams - 06/17/2009 Edited By: Jim Adams - 06/17/2009				
Short term objectives * <input type="button" value="Add"/>				
Expected Level of Achievement Method of Evaluation No. PRs Edit Rec				
Marking Period Goal Progress Report <input type="button" value="Add"/> <input type="button" value="Add Multiple"/> Edit Rec				

* - Required for child

Expand/Collapse button

assessments aligned to alternate achievement standards (PASA)

Who Can Add, Edit, Delete Goals

Case managers and contributors can add, edit and delete goals.

Add Multiple Objectives

To add multiple objectives, use the Objectives Bank (O-multi button).

Add Progress Reports

To add a progress report (typically done after the student's IEP is finalized):

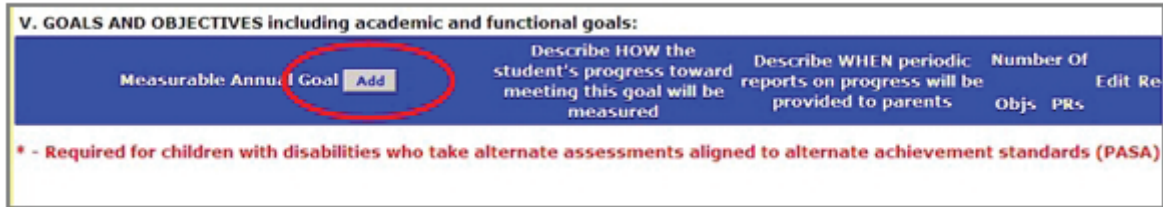
1. Click the **Maintain Progress Reports** button; the *Goals* screen displays.
2. Click the (+) on the goal for which you want to create a progress report.

Note: You can edit or delete a goal, objective, or progress report using the *Pencil* icon and *X* links, respectively (on the right). You can also change the order of the goals by using the *Reorder* arrows.

Activity 7: Goals & Objectives/Progress Reporting

Activity 7A - Adding a Goal from the Goal Bank

1. Click the [Goals and Objectives](#) link on the *Side Navigation Bar* (fly-out menu) to navigate to the *Goals* section of a student's IEP.
2. Click the **Add goal** button.



V. GOALS AND OBJECTIVES including academic and functional goals:

Measurable Annual Goal	Add	Describe HOW the student's progress toward meeting this goal will be measured	Describe WHEN periodic reports on progress will be provided to parents	Number Of Objs PRs	Edit Re
------------------------	-----	---	--	-----------------------	---------


* - Required for children with disabilities who take alternate assessments aligned to alternate achievement standards (PASA)

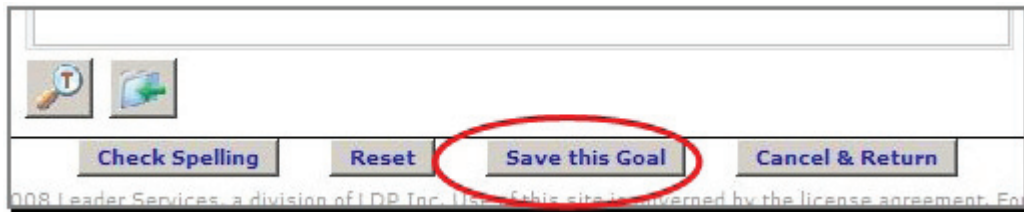
3. Click the **Search Goal Bank** button.
4. Select *Math*, *Addition*, and *Primary* from the drop-down menus.
5. Click the **Search** buttons.
6. Find the goal: * will add single digit numbers. He/She will do this with XX% accuracy (where the asterisk (*) indicates the name of the student you are working on).
7. Click the [View/Copy](#) link.
8. Change XX to 80.
9. Click the **Copy Goal to IEP** button.



You have completed this activity. Please complete the next activity.

Activity 7B - Adding Goal Text from the Text Bank

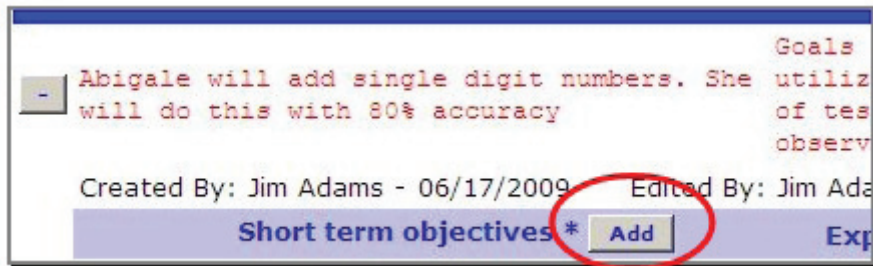
1. Place your cursor in the *How the child's progress toward meeting this goal will be measured* text box.
2. Click the **Search Text Bank** button. 
3. Select the *District Bank* radio button.
4. Select *Assessment Procedures* from the drop-down menu.
5. Click the **Search** button.
6. Find this text: *Goals will be measured utilizing a combination of tests, quizzes and observation by staff.*
7. Click [View/Copy](#) link.
8. Click the **Copy Text** button.
9. Type: "Quarterly" in the *When Periodic reports on progress will be provided to parents* text box.
10. The Goal Specific SDI section may be left blank. It is used only if you wish to designate specially designed instruction for this specific goal. There is a general SDI section later in the IEP.
11. Click the **Save this Goal** button.



You have completed this activity. Please complete the next activity.

Activity 7C - Adding multiple objectives from the Objective Bank

1. Click the **Add** button on the Objective Bar.

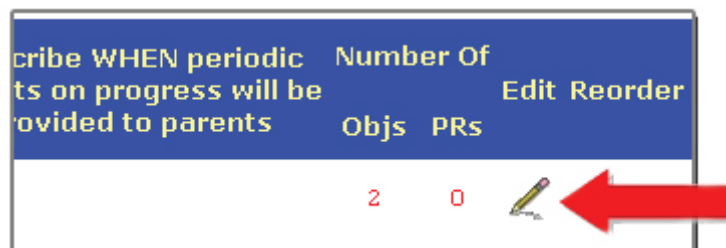


2. Click the **Search Multiple Objectives** button.
3. Select the District Bank and click the **Search** button.
4. Check any two checkboxes, then scroll to the bottom and click the **Copy to IEP** button.



<input type="checkbox"/> Copy To Goal	"" "" AbigaleAbigale
<input checked="" type="checkbox"/> Copy To Goal	Abigale can pronounce 2- listening to related aud.
<input type="checkbox"/> Copy To Goal	Abigale remain on task 1 assignment.
<input checked="" type="checkbox"/> Copy To Goal	Abigale will be able to sounds such as difference cereal

5. A preview window will display; verify your selections and click the **Copy Objective to IEP** button.



Note: Ordinarily, you would click the *Pencil* icon to the right of each objective to add the *Expected Level of Achievement* and *Method of Evaluation*. For the purposes of this training, we will omit this step.



You have completed this activity. Please complete the next activity.

Activity 7D - Adding Progress Reports

1. Click the **ADD** button on the Goal Progress report bar.
2. Type: "2" in the *Marking Period/Indicator* box.
3. Click the drop-down menu and choose *Moderate Progress*.
4. Type: "Progress is being made".
5. Click the **Save this Progress Report** button.



You have completed all the activities in this section. Please minimize your browser (do not log out) and return your attention to the trainer.

Related Services/IEP Team Questions

This area of the IEP contains five elements:

- Program Modifications and Specially Designed Instruction
- Related Services
- Supports for School Personnel
- Gifted Support Services for students with a disability
- Extended School Year

The first four sections work very much alike. These sections allow you to add the appropriate SDI/Service/Support, add start and end dates, and add locations and frequencies. You also have the ability to check “None at this time” to identify that all areas have been reviewed. The name of the person who created the service and the date each service is created will display near the service or support.

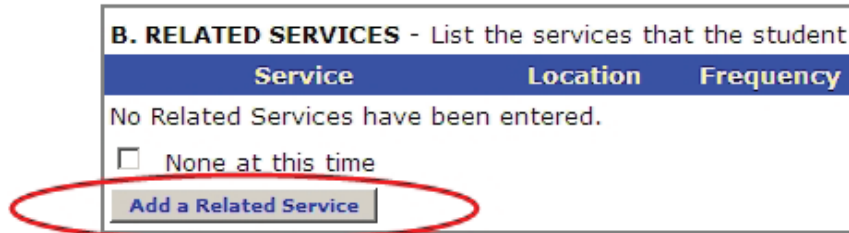
The Extended School Year area, located at the bottom of the page, allows you to determine ESY eligibility, add goals, objectives, and ESY services.

If your school district has standard text utilized for the team questions, you may want to have it placed in a Text Bank entry for easy access.

Activity 8: Related Services

Activity 8 - Adding Related Services

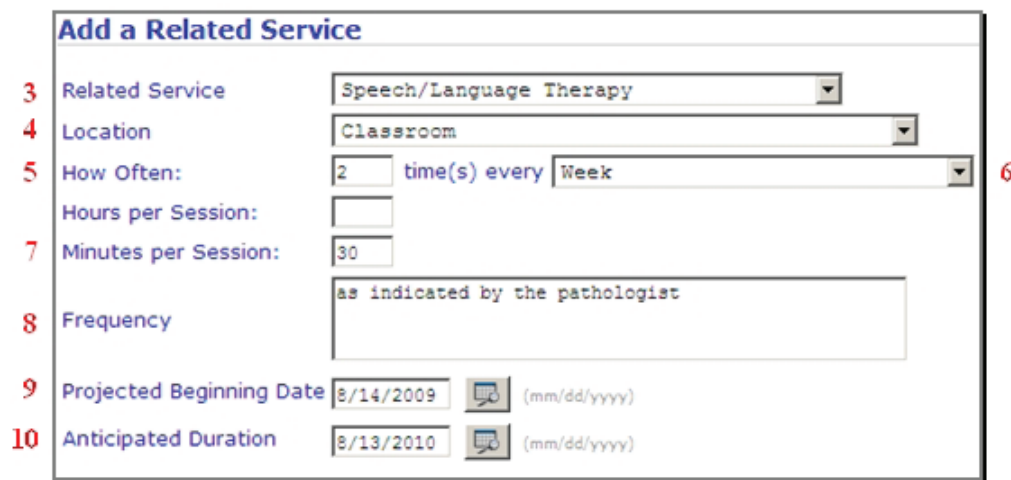
1. Click the [Special Education/Related Service](#) link on the *Side Navigation Bar* (fly-out menu).
2. Click the **Add a Related Service** button (in section B).



B. RELATED SERVICES - List the services that the student

Service	Location	Frequency
No Related Services have been entered.		
<input type="checkbox"/> None at this time		
<input type="button" value="Add a Related Service"/>		

3. Select *Speech and Language Therapy* from the Related Service drop-down menu.
4. Select *Special Ed Classroom* from the Location drop-down menu.
5. Type: "2" in the *How often* area.
6. Choose *Week* from the *Select an Interval* dropdown.
7. Type: "30" for *Minutes per session*.
8. Type: "As indicated by the pathologist" in the *Frequency* area.
9. The *Projected Beginning Date* field will display the *IEP Implementation date*.
10. The *Anticipated Duration* field will display the *IEP Duration date*.
11. Click the **Save this Special Education Service** button.



Add a Related Service

3 Related Service: Speech/Language Therapy

4 Location: Classroom

5 How Often: 2 time(s) every Week

Hours per Session:

7 Minutes per Session: 30

8 Frequency: as indicated by the pathologist

9 Projected Beginning Date: 8/14/2009 (mm/dd/yyyy)

10 Anticipated Duration: 8/13/2010 (mm/dd/yyyy)

The SDI, Supports, Gifted Supports & ESY service areas operate similarly.

Reminder: To edit the service, click the *Pencil* icon to the right. To delete the service, click the *X*.



You have completed all the activities in this section. Please minimize your browser (do not log out) and return your attention to the trainer.

LRE for PennData Reporting

You can add up to four LRE special education supports. The primary support will be reported to PennData. Remember to include the school district and building, as well as answer the *Neighborhood School* question. If you select *No* as a response, you must select the appropriate reason.

Educational Environment

If the student's educational environment will be in regular school buildings, select *A*. You **MUST** click the **Calculate** button in order to determine the LRE.

If the student's educational environment will be outside the regular school buildings, select *B*. Choose the type and name of the facility the student will attend from the drop-down menu.

IEP Attachment

You can use the IEP attachment to include additional information to the IEP. Remember to click the **Display on IEP** button.

Activity 9: LRE/PennData Reporting

Activity 9A - Select Type(s) of Support

1. Click the [PennData Reporting](#) link on the *Side Navigation Bar* (fly-out menu) to access the *LRE/PennData Reporting* section.
2. Select *Itinerant* under *Amount of special education supports*.

B. Type of Support

1. Amount of special education supports

☒ Itinerant: Special education supports and services provided less than 80% of the school day

☐ Supplemental: Special education supports and services provided less than 80% of the school day

☐ Full-Time: Special education supports and services provided 80% or more of the school day

3. Select *Types of special education supports* from the drop-down menu.

2. Types of special education supports

Primary Support: 07 - Speech and Language Support

Secondary Support (if applicable): Select a Support Type...

Third Support (if applicable): Select a Support Type...

Fourth Support (if applicable): Select a Support Type...

4. Select *Helpdesk Training SD* in the *Location of Child's Program* section, and select *School Building* in the drop-down menu for Building where the student will receive services.
5. Click the **Save and Stay** button.

Activity 9B - Educational Environment

1. Scroll down to the *Penndata* Section on the bottom of the page.
2. Select *Section A* for students who are *Educated in Regular School Buildings with Nondisabled Peers*.

<input checked="" type="radio"/> SECTION A: For Students Educated in Regular School Buildings with Nondisabled Peers...	<input type="radio"/> SECTION B: This section is for students who are Educated OUTSIDE Regular School Buildings with Nondisabled Peers...
SECTION A: For Students Educated in Regular School Buildings with Nondisabled Peers - Indicate the percentage of time the student spends in the regular classroom for this student:	

Reminder: You will need to scroll the page down to see the LRE calculator.

3. Type: "5" for the number of hours in Column 1.
4. Type: "6.75" for the number of hours in Column 2.


Column 1	Column 2	Calculation	Indicate Percentage	Percentage Category
Total hours the student spends in the regular classroom per day [5] hrs	Total hours in a typical school day (including lunch, recess & study periods) [6.75] hrs	$\frac{\text{hours inside regular classroom} + \text{hours in school day}}{\text{hours inside regular classroom} + \text{hours in school day}} \times 100 = \% \text{ (Column 1} \div \text{Column 2)} \times 100 = \%$	Section A: The percentage of time student spends inside the regular classroom: % of the day	Using the calculation result - select the appropriate percentage category <input type="button" value="Calculate"/>

Column 1
 Total hours the student spends in the regular classroom per day

Column 2
 Total hours in a typical school day (including lunch, recess & study periods)

5. Click the **Calculate** button to generate the LRE percentage.

Percentage Category
 Using the calculation result - select the appropriate percentage category



Click calculate and the percentage will appear in the table.

Indicate Percentage
 Section A: The percentage of time student spends inside the regular classroom:
74.07 % of the day

Reminder: Select *Section B* for students who are Educated OUTSIDE Regular School Buildings for more than 50% of the day.

6. Click the **Save and Go to IEP Attachment** button



You have completed all the activities in this section. Please minimize your browser (do not log out) and return your attention to the trainer.

Generating Drafts, Finalizing & Revising the IEP

Adobe Reader

In order to view any document, you must have the free Adobe Reader, which you can download from clicking [Help](#) --> Downloads. Then click the [Adobe Reader](#) link.

Generate a Draft IEP

Generating a draft will allow you to see all, or part, of the current student's IEP as it will display when you print it. To generate a draft, do one of the following:

- From the *IEP Home* page, click [Generate Draft](#).
- or
- From the *Side Navigation bar* (fly-out menu), click [Generate Draft](#).

A *Print Options* dialog box displays, allowing you to:

- Decide which section(s) of the document you want to view (print);
- Add a draft watermark (prints on all pages except Signature page);
- Place page breaks between goals, present levels, or sections;
- Append the PBSP and/or MA Consent letter;
- Customize header and footer sections.

Hint: You may need to scroll down to see the **Generate** button. When you click the **Generate** button, IEPWriter will process the request and generate a hyperlink. Either click the link to view the PDF, or right-click the link and select *Save Target* to save it on your system.

Finalize an IEP from Draft

1. Generate a draft of the IEP and take it to the IEP meeting.
2. Make any changes to the IEP as necessary.
3. Finalize the IEP when you have completed making changes and it is the final copy.

Reasons to Finalize an IEP

Finalizing an IEP does the following:

- Locks the IEP from being inadvertently revised after the IEP meeting is held.
- Automatically transfers data from the *Related Service* and *PennData reporting* sections to Children Count (if your school district uses it).
- Allows you to make documented revisions to an IEP.
- Generates a new link: [Start New IEP Based on Previously Implemented](#), which allows you to create a new IEP based on the current one (without overwriting the current one).

The same print options are available for the finalized IEP, with the exception of choosing which sections to print.

IEP Revisions

After the IEP is finalized, all changes (except for progress reporting) must be made through the revision process. When a revision is activated, the entire IEP is opened for changes. Remember to REGENERATE the IEP so that you'll have a new hard copy.

Activity 10: Finalize and Revise IEP

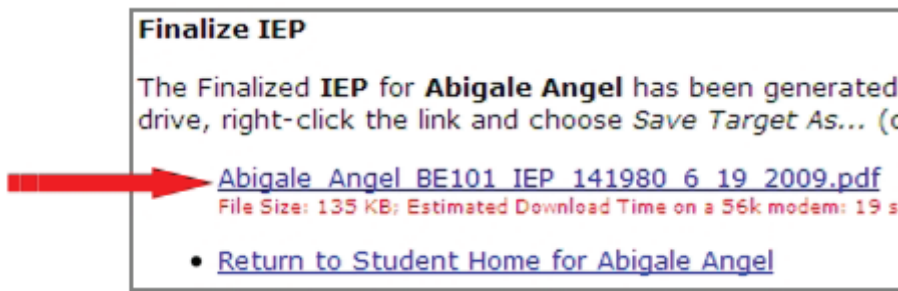
Activity 10A - Finalize the Work In Progress IEP

By now, you've navigated through the entire IEP, and you're back on the IEP Home page. If you need to navigate to the IEP Home page, use the Side Navigation Bar (fly-out menu). To finalize an IEP:

1. Click the **Finalize IEP** button.



2. Uncheck the *Page Break between Goals* checkbox.
3. Change the footer labeled *Version* to *IEP Implementation Date*.
4. Click the **Finalize** button.
5. Click the link for the IEP (contains the student's name).



6. Page through the IEP; this is what your document will look like.
7. Close the tab opened for your PDF file or click the **Close** button on Adobe Reader.
8. Click the [Return to Student Home](#) link.



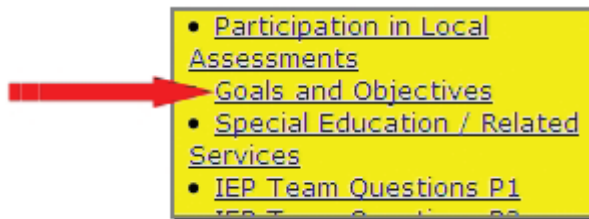
You have completed this activity. Please complete the next activity.

Activity 10B-Revise the Implemented IEP

1. Click the [View/Revise Currently Implemented IEP dated...](#) link.



2. Click the **Revise this IEP** button.
3. Complete the Revision Summary page as follows:
 - Leave the *Date of Revision* as is.
 - Type: "Adding a goal for reading" in the *LEA and Parents* section.
 - Type: (your name) into the *Participants/Roles* section.
 - Type: "Goals and Objectives" in the *IEP Section(s) Amended* section.
4. Click the **Begin this Revision** button.
5. Using the *Side Navigation Bar* (fly-out menu), click the [Goals and Objectives](#) link.



6. Click **Add** on the Goal bar.
 - Type: "[your student's name] will read a 100-page book at the appropriate grade level" in the Goal text box.
 - Type: "Observation, reading log, and quizzes" in the How progress will be measured text box.
 - Type: "Quarterly" in the when reported text box.
 - Leave the SDI text box empty.
7. Click the **Save and Lock this Revision** button. (If there were additional changes to make, you would click "Save this Goal" at the bottom of the page.)
8. Click the **Regenerate IEP** button (you may need to scroll down to see this button).
9. Click the [Return to Student Home for....](#) link.



**You have completed all of the training activities in this guide.
Please click the log out link and return your attention to the trainer.**

Conclusion

At this point, we have covered all of the material in this IEPWriter training. Please take a moment to review the list of objectives and determine how comfortable you are with the concepts and procedures we've covered.

Place a checkmark next to any topic that you're not comfortable with:

- Access the IEPWriter.com website and log in successfully.
- Navigate the IEPWriter website.
- Understand and be able to use site navigation tools.
- Add entries to each of the Library banks.
- Utilize time saving features, including asterisks and pronouns.
- Utilize bank information in documents.
- Locate student records and understand the student demographic / parents area.
- Identify and understand case manager and contributor access to student records.
- Navigate through document sections.
- Complete a School Age IEP.
- Generate a draft document.
- Finalize and Revise a document.

Now look at your list – perhaps you have a question about something you've checked?

Question and Answer Time

Feel free to ask us any questions about what we've covered today.

Contact Information

Leader Services Helpdesk
(877) 456-8777 Hours: Mon–Fri, 8 a.m.–6 p.m.
helpdesk@leaderservices.com

Feedback

Thank you for participating in today's IEPWriter training. Please take a few moments to let us know how you feel about the training today.

	Excellent				Poor
The Trainer was courteous and helpful.	5	4	3	2	1
The Trainer was knowledgeable.	5	4	3	2	1
The Trainer was easy to understand.	5	4	3	2	1
The Training materials were useful.	5	4	3	2	1
The Trainer's pace was acceptable.	5	4	3	2	1
I now understand:	Excellent				Poor
Site Navigation	5	4	3	2	1
*Student/Parent Demographics	5	4	3	2	1
Case manager/Contributor	5	4	3	2	1
Text Banks & Goal Banks adding/editing	5	4	3	2	1
Using Asterisk and Pronouns in Banks	5	4	3	2	1
Navigating document sections	5	4	3	2	1
Using saved Text & Goals	5	4	3	2	1
Printing/Generating	5	4	3	2	1
*Finalizing	5	4	3	2	1
Overall, I am satisfied with the training	5	4	3	2	1
Any additional comments or suggestions:					

*If your district permits your access to this function.

Thank you for your feedback. We sincerely appreciate your honest opinion and will take your input into consideration to enhance future trainings.